Human Resource Management System

Workday Job Aid
Time Off

Employees will enter their time off requests, which are forwarded to their Manager for review and approval. Once processed, time off is available to view and correct by the Employee and is visible on the Team Time Off view for Managers.

- ● Employees
- ○ People Managers
- ○ Human Resources

Contents

1. Time Off Overview

The concept of taking time away from work is broken into two categories: **Time Off** and **Leave of Absence**. Time Off deals with short periods in which there is a clear end date. Examples of this type are sick, vacation, or jury duty. Leave of Absence, which is covered in a separate Job Aid (SC-TRN-020 Job Aid – Leave), deals with extended periods in which an end date is not always known. Examples of this type include FMLA, Workers Comp, and Military Leave.

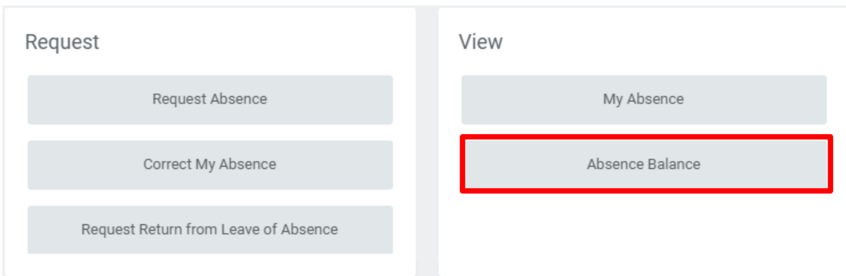
In both cases, the **ABSENCE** application is used by the employee to view information related to time off as well as enter and submit requests to take time off away from work.

2. View Time Off

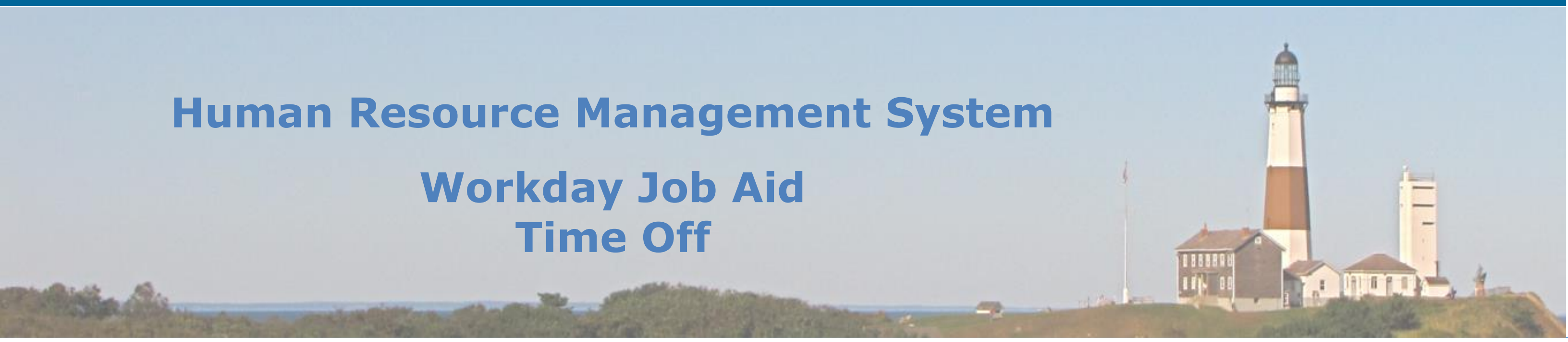
Tracking your accrual amounts is important to every employee. So is being able to see your time off requests and whether they have been approved or not. In Workday, leveraging the **Absence** application all of this is possible and then some.

1. To see a quick review of your accruals open the **Absence** application and scroll to the bottom of the page. There you will find a basic summary such as this:

2. To see a more detailed view of your accruals click on the **Absence Balance** item under the View section (see below).



3. Next, you will be asked to enter the **As Of Date** that you would like to review your accruals by. The system will default to today's date.



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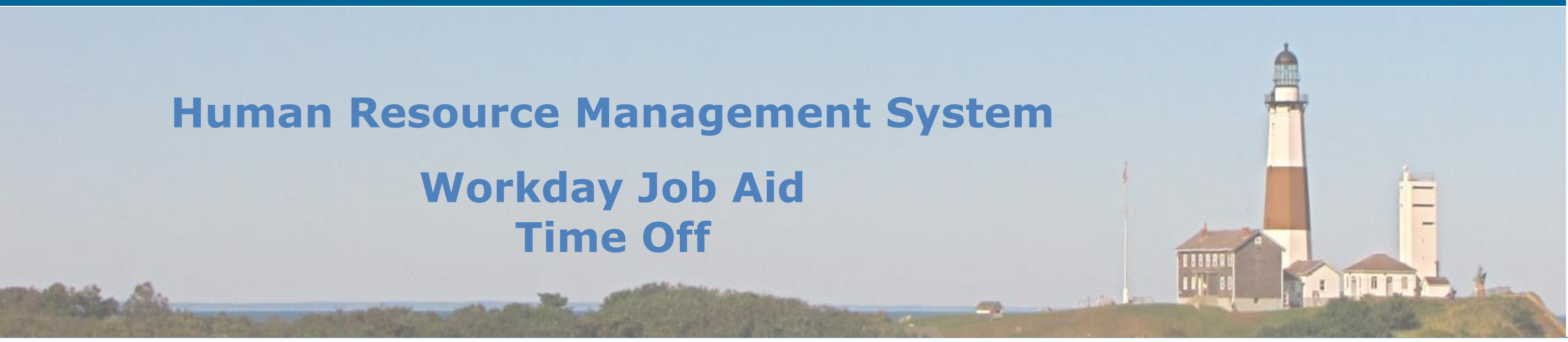
4. You will be presented with a grid that details the Absence balances as of the date entered. This includes vacation, sick, personal, etc.

Absence Balances as of Current Date

Balances Tracked in Hours 10 items

Absence Plan	Unit of Time	Beginning Year Balance	Accrued Year To Date	Absence Paid Year To Date	Beginning Period Balance	Accrued in Period	Absence Paid in Period	Carryover Forfeited in Period	Ending Period Balance	Ending Period Balance Including Pending Events	As of Period
Vacation	Hours	334.25	0	0	334.25	0	0	0	334.25	334.25	11/16/2020 - 11/29/2020 (Regular)
Cancer Screening	Hours	0	0	0	0	0	0	0	0	0	11/01/2020 - 11/30/2020 (Monthly)
Comp Time- Straight Time	Hours	0	0	0	0	0	0	0	0	0	11/16/2020 - 11/29/2020 (Regular)
COVID Comp Time	Hours	0	0	0	0	0	0	0	0	0	11/16/2020 - 11/29/2020 (Regular)
Deferred 2009	Hours	70	0	0	70	0	0	0	70	70	11/16/2020 - 11/29/2020 (Regular)
Personal	Hours	28	0	0	28	0	0	0	28	28	11/16/2020 - 11/29/2020 (Regular)
Sick- Frozen	Hours	0	0	0	0	0	0	0	0	0	11/16/2020 - 11/29/2020 (Regular)
Sick- Frozen 2006	Hours	0	0	0	0	0	0	0	0	0	11/16/2020 - 11/29/2020 (Regular)
Sick	Hours	195.75	0	0	195.75	0	0	0	195.75	195.75	11/16/2020 - 11/29/2020 (Regular)
Vacation-Frozen	Hours	0	0	0	0	0	0	0	0	0	11/16/2020 - 11/29/2020 (Regular)
									Total: 628	628	

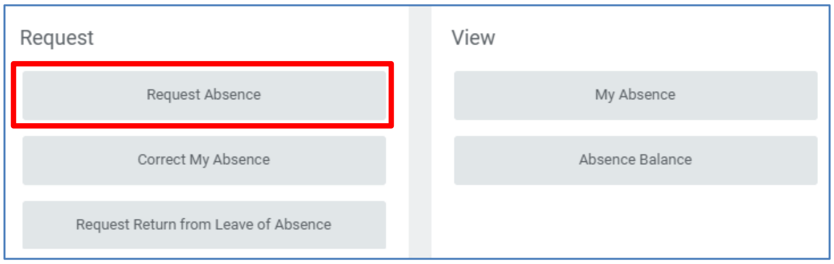


3. Request, Correct, Cancel Time Off

An employee can manage their time-off requests from the **Absence** application located on the Workday Home page. This application provides access to a host of capabilities all centered around the notion of managing an employee's time-off. In this lesson, we will review the steps involved to request time-off, update a previously submitted time-off request, as well as how to cancel a time-off request.

Request Time Off

1) Click the **Request Absence** link on the Absence page. The unified absence calendar displays.

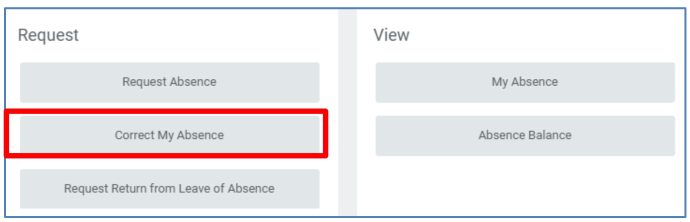


2) Click on the day(s) you wish to take time off or click and drag to select multiple days. Click on a selected day to deselect it.
   a) **Note** – Click the **Select Date Range** button to enter an extended date range. This is useful when entering an absence request that might extend into a different month or over a long period.
3) Click the **Request Absence** button. The number of days you requested dynamically displays on the button to help confirm your request.
4) Select the **Type** of absence requested from the choices provided and then click the **Next** button.
5) Click on the **Edit Quantity per Day** button and fill in the Start Time and End Time along with the corresponding numbers of hours per day you wish to take off.
6) Click the **Done** button.
7) Enter **Comments** as needed.
8) Upload any corresponding documentation if required.
9) Click the **Submit** button to submit the request for processing.

Correct Approved Time Off

NOTE: Submitted time off requests that have yet to be approved by a supervisor cannot be updated. Instead, they are to be canceled and resubmitted.

1) Click the **Correct My Absence** link on the Absence page. The unified absence calendar displays.

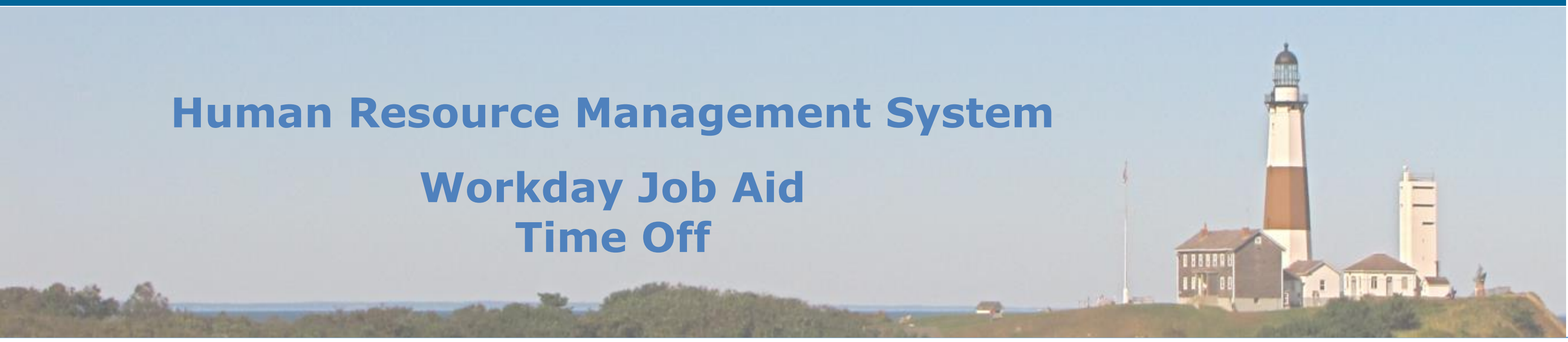


2) On the calendar displayed click on the posted time off you wish to correct. This will display the **Correct Absence** page.
3) Select the day(s) you want to correct or click the **Remove Row** icon to remove an entire day.
4) Enter the Type if an adjustment is needed.
5) Enter the new **Start Time** and **End Time** as needed.
6) Enter a **Comment** as needed.
7) Upload any corresponding documentation if required.
8) Click the **Submit** button to submit the updated request for processing.

Cancel Time Off

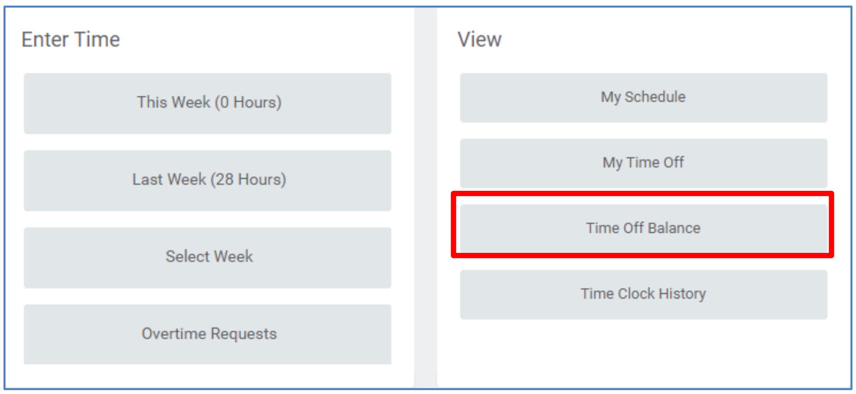
1) Click the **Correct My Absence** link on the Absence page. The unified absence calendar displays.
2) On the calendar displayed click on the posted time off you wish to cancel.
   a) If the request has been approved
      (a) Click the Remove Row icon to remove the time-off request for each day you wish to cancel. and then click Submit.

      Note: Updates to Approved Time Off requests require the manager to approve the update.
   b) If the request has not been approved a details page of unapproved time will be displayed.
      (a) Click the Cancel this Request button and then click Submit.



4. View Time Off Balances

An employee can view their time off record by clicking on the **Time** worklet from the Home page.



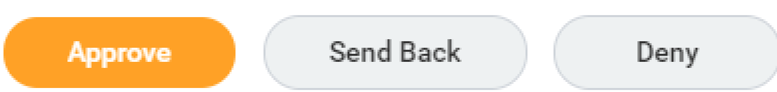
1. Click the **Time Off Balan**ce link on the View section of the Time page.
2. Enter the **As Of** date to designate the point in time you would like the review based. (Workday defaults to today's date). Click the **OK** button.
3. You will be provided a grid that displays a complete breakdown of the time off balances for each of the categories recognized by the County.

5. Approve & Deny Time Off Requests

Time off requests submitted through Workday always requires approval. This approval is performed by an employee's manager. Once an employee's time off request is submitted an approval task is created and routed to the Manager's **Inbox**. To view these tasks, the manager will access their Inbox and look for the tasks that start with **Absence**.

1. Click on the specific time off request listed in the Inbox to be reviewed.
2. On the right side of the page, the manager will see the details of the request along with the Time Off Balance information for the employee as of the current date (Click View Balances button).
3. The manager has three options concerning the processing of a time off request.
   a. They can click the **Approve** button to process the request. This task will generate a notification that will be sent to the employee.
   b. They can click the **Send Back** button requesting the employee to make changes to the request before resubmitting it. During this process, the manager will enter a reason as to why the request is being sent back. This reason should provide the employee with the necessary information to make adjustments that will cause the manager to approve the request. This task will generate a task for the employee that will reside in their Inbox.
   c. They can click the **Deny** button to deny the request. The manager will enter a reason for the denial. This task will generate a notification that will be sent to the employee.

NOTE: All three buttons are located at the bottom of the page.



6. Adjust and Override Time Off Balances

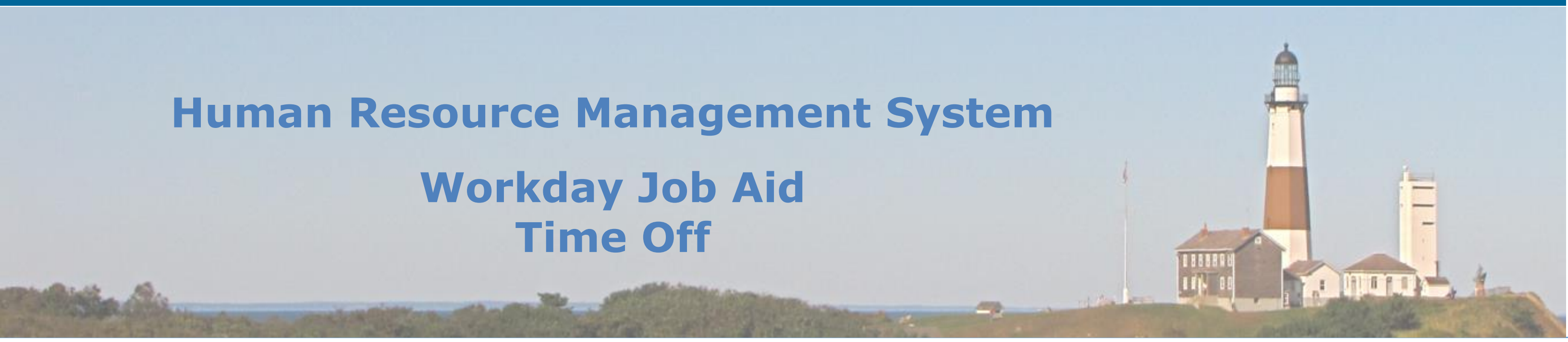
There are times when changes are needed to be made to an employee's time off balances. On rare occasions, there is a need to override (reset) totals and start the employee off with a new balance. More commonly, one-time adjustments are needed to correct issues or to make donations. In all cases, the **Payroll Partner** (formerly known as Payroll Rep) will enter these transactions. The following are the steps performed to process these types of transactions.

1. In the Search bar enter the employee's name that the Adjustment/Override transaction is to be posted to.
2. Once the employee's profile appears click the **Actions** button and scroll down to the **Time and Leave** option. While hovering over that option select the **Maintain Accrual and Time Off Adjustments/Overrides** menu item.
3. To enter an adjustment remain on the **Adjustments** tab. To enter an override first click on the **Overrides** tab.

   Note: For the remainder of this section we will assume that an adjustment is being entered. The same steps can be used to process an override.
4. Click the plus sign in the upper left portion of the gird to add a new row.
5. From the **Select Accrual/Time Off** column select the **Eligible As of Today** option and then select the appropriate option below to identify the category that best describes the adjustment.
6. Next, enter the number of hours being adjusted in the **Units** column.

   NOTE: To add hours to an employee's accrual enter a positive number. To deduct hours from an employee's accrual enter a negative number.
7. In the **Period** column select the payroll cycle this adjustment is to be applied to.
8. Enter a comment to describe the reason for the adjustment.

   Note: Please make it a point to always include a comment even though this field is not listed as a required field in Workday. The information will be used in the auditing of these transactions.
9. Click the **OK** button.
10. Click the **Done** button.



Change Log

Revision Number	Date of Change	Affected Lesson	Action	Initials
1.1.1.1	09/15/2021		Log Created	RK
1.1.1.2	11/04/2021	Time Off Overview	Added link to another Job Aid	RK